

Collaborative Review Process For Superior Performers

4-12-10

Customer

- Submits project through Electronic Plan Management (EPM) preliminary review request (this is to be able to start the process. The initial meeting is not a preliminary review but rather an initial project design meeting).
 - At this submission, the customer shall attach an agenda for the initial project design meeting
 - The customer should request which trade(s)/plans examiner(s) they wish to meet with.

Scheduler

- Verifies this is a Superior Performing team
- Reviews agenda to determine if customer has requested all appropriate trade(s)
 - Will request assistance from Lead Plans Examiner when needed
 - If additional trades are needed, customer will be notified
- Puts a note in the internal notes to the coordinator that the project is requesting to use collaborative review.

Coordinator

- Verifies the customer has an account to charge.
- Schedules an initial project design meeting with the customer to discuss expectations and number of issues that will be incorporated into collaborative review.

AT TIME OF INITIAL PROJECT DESIGN MEETING

Key Points

- This meeting will have a fee of \$145.00 per hour per reviewer
- It may utilize video conferencing

Customer

- Attend initial project design meeting with seal-holders
- Provide an agenda and memorandum of expectations with minimum defined issues that will be discussed in collaborative review.
- The designer or their designee will take minutes of the meeting that will be distributed to all meeting participants within 5 business days of the initial project design meeting

REV. 11/9/2018

Plans Examiners

- Attend initial project design meeting
- Keep notes of major code issues discussed for future reference
- Distribute disclaimer

SCHEDULING

Customer

- Submit project through EPM
 - Attach meeting notes from initial project design meeting

Scheduler/Coordinator

- Link projects in EPM

Plans Examiner

- Review meeting notes submitted by customer. Notify customer of any changes that should be made.

AT TIME OF COLLABORATION

Customer

- Contacts plans examiner and coordinator as soon as possible but no later than 2 days in advance to notify them of upcoming collaboration
 - If self-scheduling tool is in place, customers may utilize this to schedule the time
- Give plans examiner
 - The ftp site the plans are located
 - Plans/issues may also be present by email, walk in, or pdf
 - The issue(s) to be addressed

Key Notes

- Email dialogue may be utilized in order to address an issue(s) if the plans examiners schedule is not fully scheduled, or if he/she has availability
- If the customer wishes to have an immediate review, an additional fee of \$500.00 will be charged
- For normal scheduling, the fee will be \$145.00 per hour per trade

Plans Examiner

- Participates in the collaborative review initial project design meeting
- Communicates any issues to the seal-holder
- Participates in Ongoing discussions, initiated by A/E on code compliance details
- Keep notes for future reference
- Enters time into Mega Time system in half hour (1/2) increments

REV. 11/9/2018

PROCESS REPEATS UNTIL ALL COLLABORATION IS FINISHED

TO SUBMIT DRAWINGS

Customer

- Enters plans ready on date in EPM

Plans Examiners

- Gives coordinator number of hours needed to complete the review.

Coordinator

- Schedules project based on hours needed

Customer

- Submits drawings as normally required.

PROGRAM DETAILS

Availability

Service Streams

- On-Schedule
- Rehabilitation Code
- Mega

Performers

- Superior
- Successful
- Technology Needs
- When project is stubbed into Posse from EPM, have Posse allow notes to be added even though the project has not been gated.
- Make the project identifiable that it is Collaborative review in EPM and Posse for plans examiners
- Add initial project design meeting to EPM
- EPS/EPR (Electronic Plan Submittal/Electronic Plan Review) should be in place prior to program start date.

REV. 11/9/2018